

Article 1 – Name, Purpose and Non-Discrimination Policy of the Organization

Section 1

The name of the organization shall be the Undergraduate Finance Association.

Section 2

It shall be the purpose of the organization to provide students with professional, social, and educational opportunities. The organization shall host speakers from various fields of finance such as commercial banking, corporate finance, investment banking, asset management, insurance, financial planning, and consulting. Students will be able to meet and network professionals and fellow students in a casual and relaxed environment.

Section 3

This organization does not discriminate on the basis of age, ancestry, color, disability, gender identity or expression, genetic information, HIV/AIDS status, military status, national origin, race, religion, sex, sexual orientation, protected veteran status, or any other bases under the law, in its activities, programs, admission, and employment.

“The Ohio State University is committed to building and maintaining a community to reflect human diversity and to improve opportunities for all. The university is committed to equal opportunity, affirmative action, and eliminating discrimination and harassment. This commitment is both a moral imperative consistent with an intellectual community that celebrates individual differences and diversity, as well as a matter of law. Ohio State does not discriminate on the basis of age, ancestry, color, disability, ethnicity, gender, gender identity or expression, genetic information, HIV/AIDS status, military status, national origin, pregnancy, race, religion, sex, sexual orientation, or protected veteran status, or any other bases under the law, in its education program or activity, which includes employment.” The Ohio State University Code of Student Conduct, Revised 2020, Affirmative Action, Equal Employment Opportunity and Non-Discrimination/Harassment Policy 1.10.

Article 2 – Membership Qualifications and Categories of Membership

Section 1: Membership

Membership shall be granted to any undergraduate student interested in financial topics and / or a career in finance. For educational and leadership development reasons, student organizations are to be student initiated, student led and student run. The organization shall grant voting membership for various amendments to currently enrolled Ohio State students. Others such as faculty, alumni, professionals, etc. are encouraged to become members but as non-voting associate or honorary members.

Section 2: Dues and membership removal process

The fiscal year of the organization shall be from fall semester to spring semester. The amount of annual dues shall be determined each year by the current officers. Dues must be paid yearly to be considered a member of the Undergraduate Finance Association. Any undergraduate student who does not pay the yearly dues will be removed from the organization's membership list. If a member conducts his/herself in such a manner deemed detrimental to advancing the purpose of this organization or is in violation of the OSU Student Code of Conduct, they can be removed through a majority vote of the other voting membership or unanimous vote of the officers. Only members who pay timely dues are considered voting members.

Article 3 – Leadership

Section 1: Officer selection and Removal process

Officers shall be selected through various screening processes. To be considered for a position, the applicant must be a paid member of the Undergraduate Finance Association. All paid members interested in officer positions will submit an application to be considered for the position that they are interested in. Application screenings will be followed by an interviewing process conducted by the current officer board. Current officers will discuss and decide officer selections. It is within discretion of the current officers to fill an open position with two candidates if necessary. Any officer who has fulfilled his/her duties to the organizational standards can choose to maintain the same position into a subsequent year. All final decisions will be made by the departing officer board and the incoming president.

Any officer who is graduating or does not wish to remain in the position will be removed and his/her role will be replaced. If an officer conducts his/herself in such a manner deemed detrimental to advancing the purpose of this organization, is derelict in performance of the duties of his/her office, or is in violation of the OSU Student Code of Conduct, they can be removed through a majority vote of the voting membership or unanimous vote of the other officers.

Section 2: The President

The president shall be the chief executive officer. The president shall supervise the decisions and actions of fellow officers. The president shall continuously monitor the organization's actions and its ability to achieve the set goals. The president must participate in fundraising events.

Section 3: The Vice President of Corporate Relations

The Vice President of Corporate Relations shall act as the primary liaison between the Undergraduate Finance Association and companies. This individual shall contact corporate recruiters to schedule and arrange general body meetings and other extraneous events. It will be important to maintain current relationships and create new relationships with corporate recruiters. Additionally, this individual will work with the President to design the meeting schedule for the year.

Section 4: The Vice President of Operations

The Vice President of Operations shall be responsible for all logistical tasks related to the club. This includes weekly emails to members, submitting meeting information to FisherU and This Week in Schoenbaum, and updating the club website. This individual shall coordinate with fellow E-Board members to gather all information necessary for the weekly emails, construct them, and send them out to members. The Vice President of Operations will collaborate with the Vice President of Marketing for the club's social media. Finally, this individual shall lead the purchasing of club apparel and merchandise.

Section 5: The Vice President of Marketing

The Vice President of Marketing shall be responsible for promoting the events planned by all other officers. This individual shall be primarily responsible for the upkeep of the club's social media, including the Instagram, LinkedIn, and Linktree pages. This individual may collaborate with the Vice President of Operations as needed. The Vice President of Marketing will perform other duties as directed by the President.

Section 6: The Vice President of Member Relations

The Vice President of Member Relations shall act as the primary liaison between members and officers of the club to make sure the needs of the members are being met. This individual will create, collect, record membership application forms, and update the FisherU roster. Additionally, they will track attendance for all events, analyzing the date as needed. They will lead efforts to distribute apparel and merchandise to members and create a member incentive program. This individual will communicate with members and create interest surveys to understand their needs. They will work with the President to conduct the club's mentorship program during the fall semester. Finally, this individual will organize and mentor the Alumni Relations Committee, a subcommittee within the club that aims to connect members with Undergraduate Finance Association alumni.

Section 7: The Vice President of Special Events

The Vice President of Special Events shall be responsible for creating and implementing events focused on providing social, educational, and professional development opportunities for members of the club. In addition, they must develop and maintain relations with other organizations and campus offices. The Vice President of Special Events is also responsible for organizing and executing the UFA Career Fair.

Section 8: The Vice President of Strategic Development

The Vice President of Strategic Development shall be responsible for developing fresh ideas for how the club can improve its operations, relationships with student members and organizations, and anything else pertaining to the quality of the club. They will administer the FINRA SIE Prep Program for the benefit of our members. This role is versatile, providing the opportunity for the assigned officer to develop their unique viewpoint on how to advance the club and its offerings.

Section 9: The Vice President of Foundational Skills

The Vice President of Foundational Skills shall be responsible for the development of the new member education program. They are responsible for teaching baseline technical knowledge to general body members. At their discretion, they may work in tandem to administer the FINRA SIE Prep Program with the Vice President of Strategic Development. They will administer a stock market challenge for the benefit of our members.

Section 10: The Treasurer

The treasurer shall keep a current record of all financial transactions. The treasurer shall develop annual reports containing a list of all receipts and disbursements. The treasurer shall be responsible for checking the accuracy of all bills and invoices and paying them correctly and on time. The treasurer will perform other duties as directed by the President.

Article 4 – Adviser

The adviser must be full-time members of the University faculty or Administrative and Professional staff. If a person is serving as adviser who is not a member of the above classifications, a co-adviser must be chosen who does meet the qualifications. Should the adviser at any time discontinue to adhere to his/her requirement the officers of the organization will have the right to terminate and replace the adviser.

The adviser shall assist the group in their execution of roles and responsibilities. The adviser shall provide feedback to the organization regarding its operations and functioning. The adviser shall serve as a resource. The advisor shall provide advice upon request and should also share knowledge, expertise, and experience with the group. The advisor will be a non-voting member of the organization.

Article 5 – Meetings

The times for regularly scheduled meetings shall be Tuesdays at 7:15 pm. At least one day's notice shall be given for each regular business meeting except for in cases of unexpected emergencies. Officers shall meet at least once per month during the year to evaluate the organization's progress during the school year. Officers are encouraged to meet during the summer months to discuss other logistical considerations in preparation for the school year.

Article 6 – Amendments

Proposed amendments should be in writing, should not be acted upon but read in a general meeting in which they are proposed, should be read again at one other general meeting in which votes will be taken. In order for an amendment to succeed it must have two-thirds of the votes of the entire voting membership of the organization, present or not.

Article 7 – Dissolution

In order for the organization to cease two-thirds of the entire voting membership shall be required. The organization shall not dissolve until it has the required assets to cover all outstanding debt. In case of a hostile takeover of the voting membership body, the President, in coordination with the adviser and other governing offices may decide to cease dissolution.